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ABSTRACT

According to these authors, the Catholic board of education is the church's structural response to the need for the community to be broadly represented in educational policy decisions. This book of readings is intended to be an inservice tool for board members. Chapters concern the areas of board of education role, the organization of the Catholic educational system, board meeting procedures, board's relationships with principals and pastors, and goals for the Catholic school. (MLF)

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BOARDS OF EDUCATION: A PRIMER

U.S. DEPARTMENT OF HEALTH
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
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Prepared by Olin J. Murdick
and John F. Meyers

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NABE: New Force in Catholic Education

The stake of the total community in Catholic education is enormous. It is imperative, therefore, that the community be broadly represented in educational policy decisions. The Catholic board of education is the American Church's structural response to that need.

The Catholic board movement first saw the light of day in the Superintendents' Department of the National Catholic Educational Association, where it was nurtured and directed with tender care since 1964. The boards achieved maturity at the 1972 NCEA Convention in Philadelphia with the formalizing of the National Association of Boards of Education, and today they have full responsibility for shaping their own destiny.

As of June, 1972, NABE enrolled some 700 individual members. Seventy-five diocesan boards were represented in the Association, 23 of which had 100% enrollment of their members. In addition, there were some 140 parish boards, and another five or so regional boards. These figures represent a dramatic increase since NABE's beginning in 1970, with a total membership of 32 individuals.

At its first business meeting in April, 1972, the Association ratified its bylaws, elected permanent officers and an executive committee, and officially became a commission of NCEA. It also adopted direction-setting resolutions, urging the development of programs and structures for total Christian education, the achievement of equal educational opportunity, the need for cooperation with all publics within the diocese--especially the pastoral councils--and the

establishment of programs on family, sex education, drug abuse, draft counseling, career education and peace studies. Unquestionably, the Catholic board movement has come a long way since its initial conception.

Continued growth, however, will be related to the future successful functioning of NABE, and this success will depend not only upon an increase in its membership, but also upon the developing maturity of its members. Dedication to Catholic education is an important quality in any board member. But it must be supported and nourished by expertise in the decision-making process and in factual knowledge of the issues confronting nonpublic education today.

One of NABE's objectives, therefore, is the development of the boards' leadership potential. To this end, it offers concrete help to all kinds of boards in the form of publications, workshops and consultation on key problems frequently encountered, especially by new boards. At present, literature on boards is sparse, and we have had to rely almost exclusively on the generalized instructions contained in New Patterns for Catholic Education by Davies and Deneen (Croft) and upon the Voice of the Community issued by the Superintendents Department. The latter volume is in the process of being updated for release in the fall of 1972 by Monsignor Olin Murdick, former Director of the Commission on Boards and now Director of Education for the United States Catholic Conference. The present book of readings, which contains these remarks, and which is being issued by the NCEA Commission on Boards is, thus, a much needed in-service tool for achieving our instructional objectives, and NABE welcomes it gratefully.

Another of the Association's objectives is to provide boards across the country with a significant national platform from which they might exercise their growing influence and fulfill their responsibilities. Although boards

are more than justified by philosophical reasons, there is also a compelling political rationale for their existence and support. As the superintendents noted in their 1967 report on the board movement, the cause of Catholic education is considerably enhanced when it projects an image of democratic representation in policy-making. For example, one of the boards' current concerns is the financing of Catholic education. In our efforts to promote justice for the Catholic school patron, and also to elicit increased financial aid from the community, it is critically important that we have national direction for local programs and also that there be an organizational structure for putting the case before the full citizenry and the legislature. NABE seeks to provide those forms of assistance.

Participative decision-making is undoubtedly one of the most exciting directives to emerge from Vatican Council II. And, surely, the board movement is among the brightest hopes for implementing this directive within an educational context. The National Association of Boards of Education invites you and all your colleagues to join us in our continuing efforts to promote this effectiveness and thereby to help realize the eudcational mission of the Church.

Mary-Angela Harper, Ph.D.
President,
National Association of Boards of Education
NCEA

BOARDS - WHO NEEDS THEM?

We all do! And it seems to me that this need extends from the smallest child to the nation as a whole.

The nation today is beset by many educational problems, and high among them is the lack of adequate financial resources to meet the educational needs of all the people. To have the private investment in education diminished or extinguished would be a national tragedy. Boards of education in the private sector, banded together on the national level, could be a positive force in securing the kind of federal legislation which would help protect firstly, the right of parents to choose the education of their children, and secondly, the beneficial fruits of pluralism in American society. With these two rights better protected, the quality of life in this nation would be enhanced for all people.

The various states and local districts, because of constitutional responsibility for the education of the young, have a vested interest in expanding the private investment in the field of education. Elected boards in the private sector extend the policy-making role for the school or system to the people served, and therefore they can broaden the base of support, both moral and financial. This can serve as a determent to ever greater demands on the educational tax dollar.

Pastors and school administrators need the insights and judgments of the members of a board. To determine objectives, to set policies which are the guidelines for the administrators in achieving these objectives, to review administrative decisions or rules made to implement the policies, and to evaluate the effectiveness of the policies adopted in the light of progress in reaching objectives and goals is no easy task. The task, however arduous, must be done if the energies of the personnel of the school

are to be properly focused. And this is the work of the board. For this work to be rich and broad and deep, it needs the honing effect on ideas which can only come from group interaction and reaction. Thus, pastors and administrators can be real beneficiaries of the existence of boards.

The personnel who staff the educational institutions need a board of education. When policy-making and rule-making roles are exercised by one and the same person, there is a real possibility that the educational enterprise will be run in an autocratic fashion. This leaves little room for a dedicated staff to be involved in any way with decisions which affect the teaching-learning atmosphere of the educational effort. Studies are sufficiently numerous to indicate that participative management is the most productive. And boards, because of their patterns of procedure, can stimulate a certain reflection of these patterns on the part of staff for the benefit of all.

Whether or not the need is felt, students on any level need boards. The whole educational enterprise is geared primarily to the needs of the students who are engaged in the educational process in a formal way. The input from interested people with varied backgrounds and insights cannot help but enhance the value of policies formed to direct the thrust of the educational effort, and thus enhance the quality of the educational offerings for the students.

Last, but not least, parents need boards of education. To paraphrase a recent commercial, children are their most important product. And the education of these children is among their most important concerns. To have an elected body, such as a board made up mostly of parents, responsible for the policies which direct the education of the parents' children and which is also responsive to the needs and concerns of the people who

elected them, is as it should be. We hold as a first premise that parents have the first right and therefore duty to educate. And I submit that through the elected board of education parents can most effectively have a voice in the formal education of their children.

Who needs boards of education? All of us who are concerned with any element of the formal educational process need boards. Therefore, it seems to me that all who are in positions to bring boards into being, or to strengthen their functioning, perform a singular service to education if they, in fact, render boards fruitful to their fullest potential.

Rev. Msgr. James D. Habiger
President, Chief Administrators of
Catholic Education, NCEA

WHAT SHOULD A BOARD OF EDUCATION DO?

A Catholic board of education is a group of laymen (as distinguished from professional educators) who, as representatives of a given community, are formally charged with the responsibility for identifying and expressing the educational goals and objectives of the community which they serve. They develop and formulate the policies which they deem necessary or suitable to achieve these objectives and goals, and ultimately evaluate the educational programs which these policies make possible.

Thus the chief purposes of a board meeting are:

1. To identify and express the objectives of the educational program(s) and institution(s) for which it is responsible.
2. To express in policy language its intent for the guidance of the administrative staff in working towards those objectives.
3. To monitor the program(s) it has authorized, i.e. administrative decisions which have been made to implement the board's policies.
4. To evaluate the effect of these programs, expressions of board policy in achieving the board's objectives.

Every time the administrator, meeting with the board as its executive officer, poses a policy question, he is asking the board to rethink or reapply the objectives which it has already established for the school or other educational programs. It is not necessary nor perhaps even desirable for the board to have a priori a complete and systematic well articulated philosophy of education to which it refers whenever it is called upon to develop a policy. However, it has an obligation to ask the appropriate philosophical questions, to seek worthy and consistent answers, to encourage and demand programs which give reasonable promise of realizing the objectives and goals established.

Surely the distinctive goal of a Catholic school must be the Christian formation of the children attending. This must include three degrees of

personal development:

1. Cognitional development: knowledge and information about the Christian belief and practice.
2. Attitudinal development: the acquisition of Christian attitudes toward every aspect of human life.
3. Behavioral development: the acquisition of habits of Christian behavior.

It is not enough, however, for the board to be committed to general goals. The control which the board needs to exercise, and the direction which the administrator needs to have, require the establishment of specific achievable educational objectives. The board, therefore, should be asking itself what kinds of knowledge it wants imparted, what kinds of attitude it wants created, and what kinds of behavior it wants to encourage--and hopefully, to become manifest. One such objective might be the Christian doctrine, attitude, and behavior regarding race.

Having identified these objectives the board should be asking what educational program or program components will enable the institution to achieve these objectives. Obviously the curricular and organizational possibilities in a given school will vary greatly depending upon several factors:

1. The sociological characteristics of the community in the midst of which, and in behalf of which, the school operates.
2. The character and background of the children attending the school.
3. The attitudes and competencies of the teachers and the administrator(s).
4. Many other environmental and psychological factors relating to the learning capability of the individual child.

The actual design of educational programs and program components will, as a rule, derive from the professional staff, but the authorization of such programs--formally, and in terms of final budget approval--is the responsibility

of the board. Board decisions relating to programs are or should be of a policy nature. They should give guidance to the administrator, who must have as much discretionary latitude as his professional competence suggests within the limits of the board's expressed objective. As Davies and Brickell have stated, every policy "must be narrow enough to give clear guidance to the superintendent (administrator) as he makes decisions. But it must be broad enough to leave room for him to use his own discretion in making decisions--room for him to maneuver as necessary in meeting the circumstances of individual cases."[1]

For example:

An elementary school principal, feeling a need to provide more meaningful educational experiences regarding the Christian attitude on race, proposes to her board a plan for a systematic exchange of students in her school, predominantly white middle class, with students from another Catholic school, predominantly black and poor. In the face of such a bold, innovative program concept the board must ask itself if, indeed, the concept is not in keeping with its objectives as a Christian school and if the idea is not feasible and worthy of implementation. Facing such an issue in the presence of a possible negative community attitude could be the moment of truth for the board, for the community, and even for the very idea of a Catholic school. But it is board structure and process faithfully applied in the policy area which will provide the Christian community with the leadership and the rational decision-making capability it needs.

Having identified its educational objectives--an ongoing responsibility of every board--and having authorized in terms of various policy decisions

[1] Daniel R. Davies and Henry M. Brickell, How to Develop School Board Policies and Administrative Regulations, Croft Educational Services, New London, Conn.

and program(s) it wants to operate, the third essential function of the Catholic board of education must be the monitoring of that operation, not in order to meddle with the process, but rather to be advised and assured that the program authorized is, indeed, working, i.e. that board policies are being carried out.

The fourth essential function of the board, one which must be performed if the cycle of control and accountability is to be complete, is evaluation. The ultimate question which each board must ask is whether or not, or to what extent, the program which it has authorized and monitored has in fact resulted in the achievement of its established objectives.

Evaluation, of course, is a complex activity involving a variety of techniques, formal and informal, objective and subjective, and includes of necessity not only professional staff, but very importantly, lay persons as well. The latter, in terms of their representative lay board, have the basic and ultimate right to evaluate all programs which are means to serve their needs. It is the board of education which, having formulated the educational objectives of the community, now undertakes to determine whether or not or to what extent these objectives have been achieved.

There are some who may question the propriety of allowing laymen, i.e. nonprofessionals, to pass judgment on a professionally designed, conducted program. However, if laymen with professional help are competent enough to define educational objectives, they can and ought, with the right kind of data, to judge the success of an educational program in terms of those objectives. Any educational program which in the last analysis cannot be evaluated in terms of product, and this by those who set the goals in the first place, cannot expect to endure and hardly deserves to.

Every action, every concern of a policy-making board, should be related

to the goals and objectives--policy and program--process and product--cycle. No report should be prepared, no study should be made, no planning undertaken unless it enables the board to serve more adequately and effectively the educational needs of the community.

Policy-making is what the board does to get the most out of the programs it authorizes. It is probably the only way a board can give the administrator "the sense of direction he needs without neutralizing the professional skills he is paid for."

Any tendency that a board has to take over, to perform, or to second-guess administrative functions represents bad practice not only for the board, but for the administrator himself who, whether by default or failure to resist such a take-over, ceases to perform the functions which are properly his.

Indispensable to a correct understanding of how a board functions is the comprehension of three key words: policy, rule and bylaw. Equally important for effective boardmanship is knowledge of how to run an effective board meeting. The best available explanation of the above concepts is to be found in New Patterns for Catholic Education, the board movement in theory and practice, by Daniel R. Davies and James R. Deneen, Croft Educational Services, New London, Conn., chapters VI and VII.

For an excellent discussion of "How the Board Can Assess Educational Outcomes," see chapter VIII of the same publication.

Rev. Olin J. Murdick
Director, Department of Education
U.S. Catholic Conference

ROLE OF DECISION-MAKERS IN EDUCATION

Establishing the roles in any organization is difficult and establishing the roles in Catholic education at this period in our history is especially difficult.

The first difficulty is that the lines of decision-making have been diffused by an interlocking and complex structure. The tripartite organization, as discovered by researchers in the Study of Catholic education in the Archdiocese of Portland, Oregon, has traditionally made decision-making at least complex.[1]

The relationship of the archbishop directly to the pastor, the relationship of the Office of Education to the principal and staff and the third unit in the tripartite organization, the religious congregation's relationship to the religious principals and teachers, have all contributed to a blurring of the lines of decision-making. Establishing the roles of all concerned in such an organization has been difficult. Even today, when we have more clearly spelled out responsibility, especially in the formation of boards of education, we continue to rely on voluntary acceptance of the organization and suffer from the tendency to revert to former modes of operation, especially when it is to our advantage.

A second difficulty is the newness of a given role, especially as it applies to boards of education at the level of the diocese or the parish. Complicating this difficulty is the lack of assistance that has been given to those who have new or changing roles. Research conducted by Oregon State University for the archdiocese of Portland in regard to roles and parish educational leadership has shown clearly that the most difficulty was experienced by the chairman of the board in perceiving the role of the

[1]Academy for Educational Development, Study of Catholic Education in the Archdiocese of Portland in Oregon, (1969), p. 41-42.

principal or pastor and in perceiving his own role.[2] Certainly the fact that boards have been only recently established at the parish level makes such a confusion understandable.

A third and complicating difficulty is that those who are not the holders of the role do not have accurate perceptions of those holding responsibility in education. For example, even if a board member understands clearly his responsibility, others in the diocese may not have that same understanding and the board member may not, as a result, be effective.

I will mention briefly the important members in decision-making in education: the chairman of the board of education of the diocese, the members of such a diocesan board, the executive officer of the board, the pastor in the parish and the principal of the school in the parish. The charter of the board of education of a diocese is usually very clear as to the competencies of the board members and the chairman of such a board.

> "The 'Diocesan Board of Education' shall have the responsibility for establishing policy in all matters pertaining to education in the Archdiocese of Portland in Oregon, including all pre-school, elementary, and secondary Catholic education encompassing the schools, the CCD programs of religious education on this level; all Archdiocesan and parish-sponsored adult religious-education programs, and the Newman Apostolate."[3]

Clearly, then, the board has the role of establishing policy for

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[2] Dick Withycombe, Parish Educational Leadership, (Center for Educational Research and Service, Oregon State University, June, 1971), p. 42.

[3] Constitution of Diocesan Board of Education of Archdiocese of Portland in Oregon, p. 1.

education in the diocese. Its relationship with the bishop of the diocese is also spelled out. The executive officer--the director of education or superintendent--is clearly the one who implements the policy and decisions of the board. He is the administrator of education and has the responsibility for "discretionary action" in order to accomplish what the board has given him as the policy. The role of the executive officer includes furnishing information to the board so that the board may set policy. Essential to the difference between the board and the executive officer is the distinction between policy-making on the part of the board and administration belonging to the executive officer.

While the pastor's role is not as clearly defined and some pastors feel they may be pushed out of education by professional administrators and by developing parish boards, the role of the pastor is essential. In the research previously referred to conducted by Oregon State University on role perceptions, pastors considered the first and principals and parish school board chairmen considered the second most significant role that of spiritual leadership.[4]

In the report of the Academy for Educational Development in the Study of the Archdiocese of Portland given in 1969, the role of the pastor was also considered to be very important in the decision-making process of the local board. "For the pastor to abdicate his leadership responsibility under the guise of giving the local board full democratic control would in most instances leave a leadership vacuum in which even the most qualified local board would be unable to function."[5]

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[4]Withycombe, p. 19.

[5]Academy for Educational Development, p. 49.

The principal's role, since it corresponds in large measure to that of professional administrators in public education, has been more firmly established. In the role perception research of the archdiocese of Portland previously referred to, the responses of the principals followed a rather tight pattern and showed the greatest consensus.[6] Better preparation and experience professionally probably account for the clarity discovered. The principal sees herself as the educational administrator of that local school.

What we have referred to previously in regard to the role of the indicated members comes from fairly formal and legal descriptions of roles in education. Charters, constitutions and bylaws have contributed more recently towards clearer descriptions of the roles. Important to an understanding of these roles is what can be called an organizational flow-chart showing the relationship of all those previously referred to in the decision-making process. As essential as such a flow-chart is to the organization, the establishing of roles of members is much more difficult than simply issuing a chart. Formal and even legal descriptions of the role of the chairman of the board, board member, executive officer, pastor and principal serve a useful purpose, but the actual role will depend on much more than such formalization. Even legal dictates for public school boards will not be sufficient to firmly establish the role. Although the law may call for the school board to make the final decision in all hiring, in practice the board may not see itself in such a role.

Generally, the picture people have of the role and a consensus of various groups of people will have the most meaning in establishing the

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[6] Withycombe, p.2.

actual role of the educator. The expectations people have for the principal of a school may have much more to do with the actual understanding of the role and his effectiveness in carrying out that role than any formal or legal dictates.

In Portland's research in role perception, the principals were fairly close in choosing three important perceptions of the principal's position: 1) to set general school atmosphere, 2) to assist teachers with curriculum, and 3) to supervise teachers.[7]

The fact that chairmen of local parish boards of education saw "set general school atmosphere" as ninth on the list certainly is going to cause confusion and make the work of the principal more difficult. How can a principal fill the expectations of the local parish board if the principals do not consider those expectations of the board members very important? How well will the principal fulfill his role if the board member does not consider the number one item listed by the principal as being very important? Much more difficult is living the expectations of those who are one, two or more steps removed from the actual role.

Research has shown, as would be expected, that the further removed the person with the expectations is from a role, the less agreement exists as to what that role really is. Much more appropriate than referring to a single role is the concept of referring to a role made up of many roles. For example, you may find general consensus as to one part of the role of board member or executive officer but very little consensus about the many other parts of the role of those two positions. The part played by the board member in the finances of education in the diocese may be widely

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[7]Ibid., p. 2.

shared by those close to and far removed from the position; but the role played by the board of education in regard to curriculum in schools may not be that widely shared.

Also, it is easier to establish what the tasks are that are part of the role, for instance, of the executive officer of the board. Not so easily identified are the performance requirements for that role or the qualities that should be held by one in that role. There is a tendency to think of the role of the superintendent only in terms of tasks and little attention given to the importance of the qualities of the role of superintendent, performance or other items that will contribute greatly to the success or effectiveness of the superintendent.

I am convinced that it is not enough simply to formalize the role of the positions we are discussing in a charter, bylaws or even a handbook. We must see that the perceptions and expectations of countless people who are important in filling that role must be considered. We have to understand that expectations for the role do not give us one pattern of consensus for the role but rather give us a pattern of consensus or lack of it in regard to various items making up the total role. I am also convinced that we have to work very hard to establish that consensus, especially as it may apply to the highly ranked items found in that role. "Coordinating instructional program" was seen as a very important part of the role of principal by the principals interviewed in our research.[8] It seems to me that an attempt should be made so that the same perception of principals is shared broadly in the consensus of all of those who are working with and affected by the work of the principal.

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[8]Ibid., p. 6.

It is not sufficient for the principal to have a clear picture of the principal's position nor is it sufficient for the pastor or chairman to have a clear picture of the pastor's or chairman's position. Each position is so critical to decision-making and to the work of education that we have to work at a common understanding of each position so that those who are supporting and affected by education will also perform their roles with effectiveness. For example, in our research, supervising teachers was listed by principals as an important part of the role. But if the board members, parents and teachers do not see the work of supervision as important, there is real doubt that the principal will ever be effective in carrying on the work of supervising teachers. Even if the diocesan board of education has a very clear picture of its role in establishing policy regarding the hiring of personnel in diocesan schools, that policy stands little chance of implementation if that same clear picture is not shared by all of those who must implement and support the policy with regard to personnel.

To reach consensus, especially on important items in the roles we are talking about, may be difficult. However, unless we do develop shared expectations for the roles involved, it seems to me that people occupying these positions cannot be effective. I would call for an internalizing of organizational flow-charts. Knowing the decision-making process and the formalized roles as found in charters does not mean that people have a clear understanding and, more important, an acceptance of the roles as outlined. Telling people that this is your role or that is his role or their role simply does not mean that people therefore accede to the role as described. People must understand and accept that this is what my position is and that is what his position is.

Our research showed that there simply had not been enough discussion among those that were interviewed--pastors, principals, and chairmen of the board--regarding very important positions in education. The interviewers felt that what was being said to the interviewer about role perception and also about problems and strengths and weaknesses should have been discussed previously by those who were involved. In identifying roles each depends on others for stimulus to help identify what the position is and become more confident in working in that role. Very simply, if we do not have a free exchange in which we hear from others what they like or dislike, how they see us working or how they see how we should work, we will never be very clear in the expectations that people have of us nor will we be able to develop a sureness that is necessary for competency. What is called for, it seems to me, is people in education, especially in the positions that we are discussing, who will be aware and sensitive to those with whom they work and with whom they relate. Not to express their own doubts about the position nor to question the picture that others may have of what they are doing is unfair to them, to others with whom they work and to the many people to whom they are responsible, especially to the children in our schools. A child or student is of the highest importance in education and should be central to our discussion of organization and the roles that all occupy. Sometimes the importance of learning is not highlighted as people involve themselves in structural questions.

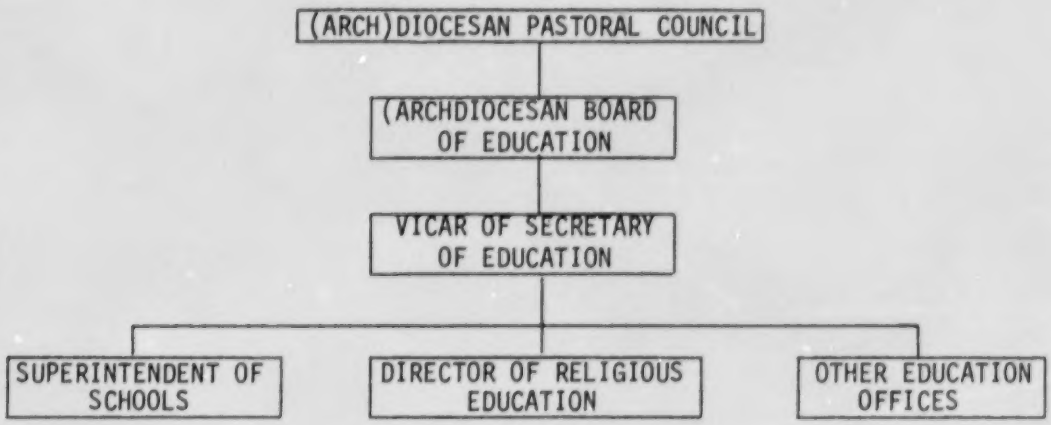
In summary, yes, I see the importance of formalizing the roles and relationships in charters and constitutions, bylaws and handbooks. Yes, I see the importance of flow-charts for the organization to see the places occupied along the decision-making line. But more important, I see the

necessity for identifying the expectations that people have for the role that each one occupies and finding the consensus that may exist with regard to items contained within that role, especially those items which are most important. In connection with that, I see the necessity for internalizing the formalized roles, making them a part of one's self and being of constant assistance to each other in developing and understanding the work each is doing, the relationship that each one has to the other. In the process of that exchange, people are strengthened in that position and, what is most important, strengthened in the work of educating children.

Rev. Emmet Harrington
Secretary of Education
Diocese of Portland, Oregon

ORGANIZATION OF AN (ARCH) DIOCESAN EDUCATIONAL SYSTEM

The diocesan educational organization plan recommended by a majority of the members of the Superintendents' Committee (NCEA) on Policy and Administration is based on the principle that the educational mission of the Church, however varied and diverse, should be guided by one comprehensive board of education which, in turn, along with other specialized boards in the (arch) diocese, receives its direction and priority indications from an (arch) diocesan pastoral council graphically represented. Such a plan would be as follows:



The above organizational chart recognizes two essential needs: viz, the need for professional autonomy on the part of each department, and the need for administrative coordination with reference to all departments. The ultimate coordinating authority, of course, is the (arch)diocesan pastoral council which, through appropriate committees (finance, program planning, etc.), will establish priorities and give general direction to the (arch) diocesan board of education. This latter board, however, duly elected by some representative process, would have authority to establish all policy regarding education, schools, C.C.D., adult education, etc. The executive

officer of this board, selected by the ordinary, would be generally responsible for all educational programs, presenting to the board their policy needs and reporting their progress or lack of it.

Whenever communicating with the board, the vicar of education would normally call upon each department head, superintendent or director, to present the details and to answer questions regarding his respective departmental needs and activities. Each department head would, according to need, have the option of establishing an advisory committee for his own department. This committee, consisting of persons especially knowledgeable or interested in the work of the department, could be a source of constructive criticism, advice and encouragement for the entire departmental staff.

Rev. Olin J. Murdick
Director, Department of Education
U. S. Catholic Conference

THE DIOCESAN PASTORAL COUNCIL AND THE DIOCESAN BOARD OF EDUCATION

1. The Mind of Vatican II on Coordinating Councils

Repeatedly, in the Decree on the Apostolate of the Laity, reference is made to the coordinative function of central authority and its need to have "due respect for the particular character of each organization." Thus, in Chapter V, the statement is made: "Whether the lay apostolate is exercised by the faithful as individuals or as members of organizations, it should be incorporated into the apostolate of the whole Church according to a right system of relationships (emphasis added). The spirit of unity should be promoted in order that fraternal charity may be resplendent in the whole apostolate of the Church, common goals may be attained, and destructive rivalries avoided. For this there is need for mutual esteem among all the forms of the apostolate in the Church and, with due respect for the particular character of each organization, proper coordination.

"In dioceses, insofar as possible, there should be councils which assist the apostolate work of the Church.....While preserving the proper character and autonomy of each organization, these councils will be able to promote the mutual coordination of various lay associations and enterprises. Councils of this type should be established as far as possible also on the parochial, interparochial, and interdiocesan level as well as in the national or international sphere."

2. The Situation

With the advent of diocesan pastoral councils, which are intended by the Decree on the Laity to exercise a coordinative function with reference to a variety of diocesan services, (education, charities, etc.) a certain confusion has developed concerning the role of the diocesan board of education. Some diocesan synods make no mention of a diocesan board, but

do acknowledge a vicar of education. The diocesan pastoral council is seen as having a certain prerogative in the realm of educational policy, this presumably in order to exercise its coordinative function.

3. The Coordinative Function

That coordination is the function and responsibility of a diocesan pastoral council is clear from the Decree on the Apostolate of the Laity which states in Section #26 that "in dioceses...there should be councils which assist in the apostolic work of the Church either in the field or evangelization and sanctification or in the charitable, social and other spheres...While preserving the proper character and autonomy of each organization, these councils will be able to promote the mutual coordination of various lay associations and enterprises."

If the diocesan pastoral council, envisioned primarily as a "coordinating" agency for "the various lay associations and enterprises" is to preserve "the proper character and autonomy of each organization," it must permit each organization--in this case, the diocesan board of education--to perform its basic policy functions which are: 1) to identify in behalf of the community its educational goals, 2) to select appropriate educational programs which will enable the Catholic community to achieve its educational goals, and 3) to indicate the anticipated cost of said programs and to seek support for said programs.

The coordinating function of the diocesan pastoral council ought to be advisory regarding program design and development; definitive program expenditure. If the resources at the disposal of diocesan authority are limited, the pastoral council must assign priorities among the various proposed programs, education being one.

The council or the bishop, on the advice of the council, may find it

necessary, therefore, to advise the diocesan board of education that it will have to do with less money, less diocesan subsidy than originally requested, less parish subsidy, perhaps, or a smaller share of the diocesan development fund than expected. Having been so advised it then becomes the responsibility of the board either to redesign its program(s) or to modify its goals, quantitatively and/or qualitatively in the interest of imposed economy. It is not proper for the pastoral council to perform these latter functions.

4. The Communication Function

This is not to say that the pastoral council may not speak out on the subject of educational goals and programs. It can and should do so as a body representing the total community for it is in an excellent position to give voice to the educational aspirations and needs of that community. However, its function at this point is communicative; not definitive nor determinative.

The diocesan pastoral council may very properly advise the diocesan board of education at any time. It certainly may do so on the occasion of its response to the annual budget request of the diocesan board of education. However, it is the board of education which makes the determination, not the pastoral council. Otherwise the council which is a general body will have usurped the board's proper functions and the Catholic community will be deprived of the service of a specialized body chosen and authorized to represent the community in matters of education.

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THE PARISH COUNCIL AND THE PARISH BOARD OF EDUCATION

The parish council is the most basic policy authority in the modern parish. As such it serve a coordinative and communicative function with reference to all specialized agencies and programs carried on in the parish or under parish auspices. One such special agency is the parish school with its own board of control.

The parish board of education, whether it is concerned with total education or schools only, is the proper source of policy governing the educational program. It represents the parish in establishing educational objectives, selecting policies and approving programs which relate to the achievement of said objectives.

The parish council relates to the board of education in two ways: 1) by establishing priorities among the various specialized agencies and/or programs and 2) by facilitating communication in parish community with reference to its educational needs, aspirations, and achievements.

The first function, setting priorities, is performed in terms of the annual review of the budget. When a parish board of education submits its proposed budget for the coming year of operation, it is the duty of the parish council as the general coordinative authority of the parish to judge whether the budget request, in relation to all the other needs of the parish, can be granted. If, in the judgment of the parish council, the education budget requires more money than will in fact be available, it must advise the board of education to reduce their budget request. The responsibility, then, for reducing or modifying programs to fit the fiscal realities belongs properly to the parish board of education. Thus, the board retains its autonomy and prerogative with reference to educational policy while the parish council retains the right to exercise its prerogative

with reference to prior ties of program and service. In this way coordination is achieved without interfering with autonomy and proper function of the board of education.

The second function of the parish council is communicative. It provides in various ways a forum for the dialogue which ought to take place concerning everything relating to the life of the Christian community.

Here the parish council can perform an invaluable service by creating a climate and an occasion for people to express their concerns and aspirations regarding the quality of life in the Christian community.

Inevitably and very properly the Catholic school would be a subject of such dialogue. The council, however, would not be the proper agency to translate these concerns or any resulting consensus into school policy. It would rather communicate these concerns and any consensus to the board which in turn would exercise its policy function in the light of such communication.

If the board in the last analysis seems unresponsive to the desires of the community it remains the prerogative of the parish electorate to replace board membership with new representatives.

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SUGGESTED GUIDELINES FOR PARISH SCHOOL BOARDS

(As developed by the Archdiocese of Chicago School Office)

I. Purpose and Duties

The purpose of the parish school board is to develop and define the policies which govern the operation of the parish school. All other duties of the board are subsidiary functions to this primary responsibility.

A clear distinction must be made between a policy and a rule. The difference marks the distinction between the school board's job and the principal's job.

A policy is a guide for discretionary action. It must be narrow enough to give clear guidance to the principal, but broad enough to leave room for him to use his own discretion in making decisions. Policy-making is the way the board gives the principal the sense of direction he needs without neutralizing his professional skills.

A rule is a specification of a policy. It tells exactly what is to be done and usually leaves little room for individual judgment. Rule-making is the principal's job. It is one of the methods he uses to carry out the board's policies. A rule is an administrative regulation.

Examples:

Policy - Teachers shall be available to assist individual children outside of the regular school day.

Rule - All classroom teachers shall be in their rooms 15 minutes before classes begin each morning to help students who need special attention.

Policy - The expulsion of a child from a Catholic school is such a serious punishment that it should be invoked rarely and then only as a last resort.

Rule - If it is necessary to expel a pupil the following procedures must be followed:

1. The principal should summon both parents for a conference to explain why the expulsion is necessary;
2. The transfer of the pupil to a public school should be reported to the superintendent's office on the prescribed form;
3. With due regard for the pupil's good name, particularly if the cause for expulsion is not acknowledged, the principal should advise authorities of the receiving school to take whatever prudent steps are indicated to prevent a re-currence of the pupil's bad conduct.

Policy - Retention of a pupil in a grade for a second year is inadvisable unless the teacher can demonstrate that repetition of the grade will be profitable to the child because of particular circumstances.

Rule - When it is probable that a pupil will not be promoted, parents should be notified no later than the beginning of the second semester.

Policy - Pupils attending Catholic schools are expected to be neatly and decently dressed. The use of uniforms is entirely optional.

Rule - Under no circumstances may girls attend class wearing slacks or shorts.

In summary, the parish school board's prime responsibility is to determine local policies relating to the planning, operating, and maintenance of facilities and equipment, as well as other policies in matters where the archdiocesan school board has not acted. What follows is a partial list of other duties and functions of the board:

1. To act as a liaison body with appropriate public authorities.

2. To seek a better understanding and wider support of Catholic education within the local community.

3. To interpret the policies of the archdiocesan school board for the local administrative officers.

4. To be responsible for determing whether policies of the archdiocesan school board are being carried out.

5. To evaluate the adequacy of its own policies and the effectiveness of their implementation.

6. To be responsible for the approval of the annual budget.

II. Membership on the school board

1. The size of the board will vary according to local needs. If the board is too small there may be difficulty in mustering a quorum for each meeting. On the other hand, if it is too large, discussion will become difficult. Experience indicates that the board should have no fewer than seven members and no more than thirteen.

2. The voting members of the board should be parishioners or parents who have children currently enrolled in the school. It is taken for granted that most board members will have children in the parish school, but there is wisdom in selecting some people from the church membership at large.

People in certain categories should not be considered as candidates for the school board: 1) salaried employees of the parish, whether teaching or nonteaching personnel; 2) board members or employees of another parochial or public school.

There is no doubt that professional educators can make valuable contributions to parish school boards. Nevertheless the importance of maintaining the distinction between policy-making and administration makes it inadvisable for professional educators to serve on boards. When feasible such people may be called upon to accept membership on a board committee. In general the professional direction should come from the principal and the school faculty.

3. The pastor should be an ex officio member of the board. Note that this represents a change in his relationship to the school. In the past the

pastor has often been considered the chief administrator of the school, but under board operation he becomes a voting member of the board and not the administrator of the school.

4. The principal is the chief administrative officer of the school. He is not a voting member of the school board. This is a change from previous suggestions, but it is based on the conviction that the distinction between policy and administration should be clearly maintained.

This is not to demean nor underestimate the importance of the school principal. On the contrary it enhances his professional position. He has the responsibility of preparing reports for the board's consideration, offering counsel and advice to the chairman in drawing up the agenda for the meeting, and in other ways providing professional leadership for the board. To say that the principal should not be a member of the board does not mean that he should not be present at the board meetings. His presence is crucial and he should participate in the deliberations of the board even though he will not cast a vote on the proposed policies. A parish school board can no more function without the principal than the school board of a large system can function without a superintendent.

III. Election to the School Board

The parish school board will be as effective as the support it can muster from all parents and members of the parish. This support will be forthcoming if parents feel the board truly represents them. Consequently. they must be given the opportunity to vote for members of their choice. To assure maximum participation the following procedures should be followed:

1. Nominations. The pastor should appoint a nominating committee consisting of approximately five people whose task will be to recruit and screen candidates for the board. If there is a parish council, it might be advisable to have this group appoint the nominating committee. Sufficient notice should be given to the parish to enable interested parties to submit their names for consideration. A specified time limit should be put on the work of the committee, at the conclusion of which time the committee will submit a slate of candidates to the parish for

election. This slate should contain at least twice as many names as there are positions to be filled. If any candidate presents to the committee a petition signed by 50 parishioners that candidate should automatically be included on the slate.

2. At a specified time and according to a specified procedure, all members of the parish over 21 years of age should be allowed to vote for the candidates of their choice. To be elected the candidate must receive a majority of the votes cast. In the event that an insufficient number of candidates receives a majority of the votes cast to fill all the vacancies on the board, a runoff election should be held for the remaining vacancies. The slate for this runoff election should not exceed twice as many candidates as there are vacancies to be filled. The candidates for this election will be those who failed to get a majority of the votes cast, but who did receive the highest number of votes.

3. Except for the pastor, who is an ex officio member of the board, each member should serve a term of three years, with the exception that the original members should serve terms varying from one to three years with approximately one-third a two-year term, and one-third a three-year term, to be determined by lot or any other appropriate means.

IV. Officers of the School Board

There should be three: the president, vice-president, and secretary. These officers should be elected by the board membership at its first regular meeting of each year. Any member of the board is eligible to hold office except the pastor.

V. Committees of the Board

The board may provide for standing and temporary committees drawn from its own membership or from the community at large to prepare studies and bodies of information which will permit the board to make informed judgments.

Committees should take care not to become directly involved in the administration and operation of the school. If there are administrative matters which need attention, the committee should investigate and study the situation in order to offer counsel and advice to the principal.

There will be exceptions to this recommendation, especially if the parish schools lack adequate professional personnel for specific tasks.

In the absence of a school accountant, for example, the principal may request help from the board in the preparation of the annual budget and in setting up an adequate accounting system. Nevertheless, exceptions should be rare and should be tolerated only when there is no other alternative. These suggestions are made in the hope of maintaining the clear distinction between policy-making and administration.

VI. Meetings of the Board

The board should meet monthly on a specified day of the week and at a specified time. Special meetings may be called by the president as needed or as requested by the board membership.

All meetings of the board should be open meetings unless designated as being executive, but all decisions made in executive sessions should be presented and voted on at open sessions before becoming effective. The rights of nonmembers to address the board should be limited to those whose petition has been approved in advance of the meeting. In the event there are many such requests, the board would be well advised to hold a public hearing at a time other than that scheduled for the regular meeting. No business should be transacted at such public hearings nor should decisions be made.

VII. The Authority of the Board

1. If the school board is given responsibility for developing policies which govern the operation of the school, it should also be given the authority to make these policies binding on all concerned--parents, teachers, or principal as the case may be. Neither the pastor nor the principal should veto the decisions of the school board.

2. There are, however, limitations on the board's authority:

   A. The pastor may not delegate his responsibility for the supervision of religious education in the parish. He has no alternative except to disregard any policy which is in opposition to the teaching of the Church or inimical to

the Christian formation of children.

B. Although the board has authority to allocate the financial resources of the school itself, it has no authority over the general revenues of the parish. This is the responsibility of the pastor and his parish council. The most a school board can do is request parish support from the pastor when income from tuition and other fees is not sufficient for the operation of the school.

C. Since the local school is a part of an archdiocesan system, the authority of the parish school board is subject to that of the archdiocesan school board.

3. It may occur that the pastor will seriously disagree with a decision of the board, or that the board will disagree with an action of the pastor or principal. If this disagreement cannot be resolved, the board, the pastor, or the principal may appeal to the archdiocesan school board for a hearing on the matter.

4. If the parish school board decides to grant veto power to the pastor then the recourse process described under number 3 above should become a part of the specific article in the constitution that spells out the meaning of the power of veto.

SOME SUGGESTED NORMS FOR A NEWLY FORMING PARISH BOARD OF EDUCATION

1. Purpose

The purpose of a parish board of education is to provide the parish with an appropriate representative body for identifying and articulating the educational needs and aspirations of the Christian community, which we call goals, and which become the basis for program objectives and policies for schools and catechetical programs. The formulation of educational policy, the monitoring of its implementation, and the evaluation of all educational effort in terms of such objectives are the proper functions of a board of education.

2. Membership and representation

Although the members of a parish board of education ideally ought to be elected from the entire parish membership, some persons may serve ex officio. The pastor as spiritual head of the Christian community should, as a rule, be a member ex officio, with right to vote. Other possible ex officio members might be a member of the church committee, of the parent-teacher organization, or the parish council with selection in each case being made by the body represented. With the exception of the pastor, whose participation as a member is essential to an effective parish board, the provision for ex officio members is not, as a rule, encouraged.

3. Nominations

It may be desirable initially to ask the people of the parish to elect members to the board from a list of nominees prepared by an ad hoc committee such as the executive committee of the local parent-teacher organization.

4. The principal

The principal of the school is normally the executive officer of the board. He (she) is not a member of the board. As such, he (she) prepares

the agenda in collaboration, as a rule, with the chairman, or with a special committee named for this purpose. He (she) provides the board with reports on program operation, identifies problems involving policy questions and helps the board to evaluate programs. The principal does not vote, does not chair the meeting, should not dominate discussion nor dictate policy.

The executive officer of the board must be prepared to represent both the formal school program and the religious education program, if the latter is included in the board's jurisdiction. However, it may be desirable, where possible, to delegate responsibility for the latter program to a parish director of religious education.

5. Chairman

It is desirable that the chairman of the board be a layman elected by the board membership.

6. Voting

Each member of the board, whether elected, appointed,or ex officio, should have one vote.

7. The pastor

Since the pastor, under the bishop, is personally responsible for the administration of the parish, the vote of the parish school board, like that of the parish committee, is subject to pastoral veto. This is to say that the pastor may for good reasons, which he may or may not be able to share with the board, make a decision which is contrary to the majority vote. Such an action, however, should be very rare in occurence, for the presumption in creating a parish board of education is that those who have been asked to assist in the decision-making process are worthy of the trust placed in them.

8. Term of service

Membership on the board, with exception of ex officio members, ought to be for a term of three years with provision made for replacement on a staggered basis. (E.g. In the case of a newly constituted board all elected or appointed members ought to be assigned, by lot, 3-,2-, or 1-year terms which, when expired, would make the beginning of 3-year terms for all.)

9. Re-election

It would seem desirable that all elected or appointed members ought to be permitted to succeed themselves in terms of re-election or reappointment. However, it may be desirable to limit service on the board to two successive terms.

10. Policy vs. administration

The function of a school board is to establish policy, not to administer the school. Administrative decisions are the responsibility primarily of the principal, who seeks to conduct the educational program in terms of established policy. Local educational policy is developed, of course, in terms of policies adopted by the diocesan board of education and in terms of local needs and aspirations as perceived by the local board.

11. Board initiative

All members of the board have a right and a duty to suggest a review of existing educational policy as need arises.

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ATTITUDE OF THE PASTOR TOWARD THE SCHOOL

A Critical Factor in School Operation

One of the key persons in the operation of a Catholic school is the pastor. Whether a school is parochial or interparochial in its basis of support the leadership of the pastor is essential to the success of the school both from the standpoint of articulating for the community the purpose and importance of Catholic education and encouraging that community to support the school enterprise.

True, these are difficult times in which to exercise this kind of leadership. Educational goals must be newly perceived and relevantly stated. This calls for the highest kind of pastoral leadership and concern. Adequate financial support, which seems to be more difficult to maintain than was formerly true, presupposes in every parish considerable organizational ability and commitment on the part of every pastor.

Unfortunately, this kind of leadership is not always evident in parishes which have a Catholic school commitment. When a parish with such a commitment finds itself with a pastor who is not supportive of the school, ideologically or otherwise, a certain betrayal is often felt and a certain confusion usually results. I refer here not to those situations in which there is a demonstrable inability of parish and people to provide the necessary financial support. Where such a situation appears it is the duty of the pastor, the parish board and/or committee and the diocesan school office to study the facts and to make their recommendation to the bishop. However, in the absence of such evidence it would be unfortunate and unwise for a pastor, or assistant pastor, to be assigned to a school parish, or to continue in such an assignment once made, if he is unable or unwilling to provide the pastoral leadership which a Catholic school commitment

requires. If schools are to have the support and direction they need, it is necessary that the priests assigned to such parishes share and support the reasonable commitment of their people.

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BOARD MEETING PROCEDURES

The administrative staff (a term used to refer regularly to the professional staff of the school department, the superintendent, assistant superintendent, supervisors, etc.) recommends that the board follow in its meetings a system devised by the public schools in Manhasset, New York, and now known as the Davies-Brickell system. It has two major features: (1) It reverses the classic order of business on the agenda to put items which require action at the head of the agenda; and (2) it stresses giving much information to board members before the meeting by means of "enclosures" along with recommendations of the administrative staff.

1. The Agenda

The usual school board agenda follows an almost universal pattern in which the most important action items are left until the end of the meeting, and no clear cut distinction is made between "action" and "no action" items. The classic agenda is usually along the following lines: opening of meeting, approval of minutes, communications, hearing of delegations, committee reports, superintendent's report, old business, new business, adjournment.

In contrast, the proposed system would reverse the order of the agenda as follows:

I. Call to Order

II. Recommended Actions
  - A. Routine matters
    1. Approval of minutes
    2. Approval of reports
  - B. Old business
  - C. New business

III. Information and proposals
  - A. From delegations
  - B. From nonstaff communications and reports
  - C. From superintendent and staff

D. From questions asked of, and by, board members

IV. Future business
A. Meeting dates
B. Preview of topics for future agendas

V. Adjournment

The value of this order can be seen in an analysis of each of the steps in the agenda.

Recommended Actions. The fastest single way to clear away conversational underbrush at a board meeting is to draw a hard line between "action" and "no action" items. Almost everywhere there is a board which, after wrangling about something for half an hour, has finally turned to the superintendent to ask in exasperation, "What do you want us to do about this?" and has been told, "Nothing. This is just for your information." The proposed agenda faces this problem squarely, breaks sharply with existing patterns to place all action items where they belong -- together at the beginning.

First come the brief, familiar routines like standard monthly reports. Next are matters left over from previous meetings. Finally the board takes up new topics on which action is being recommended for the first time. This done, all official board action is completed.

Information and Proposals. This is a varied selection of matters from several different sources. None of the subjects has reached the stage where the administrative staff is ready to recommend definite action. They may be old or new topics. Often they will be matters of information requested by the board at some prior sessions. Just as often the subject will be utterly new.

Information and proposals from delegations get first place on the bill because the board probably will not want to ask official visitors to wait too long for its attention. Following the delegation are all other communications and reports from outside organizations, and written reports from citizens

committees or community groups appear on the agenda list at this point. Reports from standing committees, if such committees exist, would fall here. The chances are good that this will turn out to be a general catchall for the information and proposals which do not fit elsewhere. The section held open for the superintendent and staff is for the many "no action" matters they will present.

The next section of the agenda gives board members a definite opportunity to question the staff concerning various matters not listed for the meeting. Such questions come from citizens, from board members' own interests, from past agenda items, or from trains of thoughts started by the current agenda. The space is reserved both to make certain that individual board members have a chance to get answers and to prevent their side questions from popping up at odd moments during the meeting.

Future business. Here the administrative staff has an opportunity to give the board a preview of future agendas to give them time to think about the issues, to indicate to the staff information they will require, and to suggest the direction which the staff's recommendations should follow.

2. The Enclosures

In order for board members to make sound decisions during the meetings, it is desirable to furnish them with background material on each agenda item in advance of the meeting. This enables members to study the material at their leisure, call the administrative staff for more information if needed in advance of the meeting, and be prepared to vote at the meeting with a minimum of discussion necessary.

Enclosures may be prepared by the administrative stff or by other parties who have an interest in the agenda item.

Each enclosure is numbered to correspond to the agenda item for which it

serves as background, thus allowing board members to follow the agenda and seek out the correct enclosure.

The Davies-Brickell system recommends a third type of information in addition to the agenda and the enclosure, called the "administrative staff memorandum." It contains the recommendations of the administrative staff with reference to each agenda item. However, this strikes us as one more batch of papers to shuffle, and thus we suggest that the recommendations of the administrative staff be incorporated into the enclosures.

Each enclosure will state the "issue" as briefly as possible. It will next give the "recommended motion." Of course, the board need not accept this motion, but this helps to clarify the issue in that it gives the correct wording of the motion if the board chooses to follow the staff recommendation, (thereby simplifying the secretary's task) or gives a basis from which a new motion can be reworded.

After stating the above, the enclosure will then give all the information pertinent to the issue, along with the reasons why the administrative staff recommends the given action.

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CONDUCTING A SUCCESSFUL BOARD MEETING: BOARD MEMBERS' ROLES

The Chairman's Role

His main function is to facilitate and regulate discussion to the end of achieving consensus and decisions. He must resist the temptation to be a discussant himself.

1. He should avoid saying, "I think."
2. He should avoid reacting personally to the thoughts expressed by others. He should solicit other opinions, and seek expression of opposite views.
3. He should set up the discussion by recognizing and summarizing the problem: "You have heard the problem as stated by our administrator (superintendent principal) and you have heard the recommended solution. Do you have any questions? What is your pleasure?"
4. He should call upon the administrator as a resource person, the fact man for the board. He should not let the administrator's opinion and recommendation be a substitute for board thinking. If the board members don't ask questions, he should let the chair do so.
5. He should be conscious of the board's responsibility to take action. The action part of the meeting which is the main part of the meeting should not take more than one hour.
6. The report part of the meeting should be subordinant and subject to the discretion of the chairman. It should not be unduly long.
7. He should not assign administrative functions to committees unless this is the only or the best way to get them carried out. He should use the administrative staff--that's what they are paid for.

8. The chairman should deal with delegations this way:
   If they have made previous arrangements to be included in the agenda, he should advise them about what time they will appear. As a rule, he should let one person be the spokesman. He should limit the presentation time, if possible. He should invite board members to ask questions. He should not ask or permit the board to act immediately. He should not encourage board member response at this particular meeting. If the situation indicates, he may ask the administrator to make some immediate response supplying information, comment or explanation. He should thank each delegation for coming.
9. The chairman should deal with guests, general observers and special interest groups in this manner: He should permit comments and inquiries. He should not allow a dialogue to develop between the board and the audience. He should ask delegates and visitors who address the board to identify themselves by name, parish, etc. and thank everyone for coming. If action is needed or sought, he should indicate that the board will study the matter and act accordingly.
   He should ask the administrator to investigate the problem and to report at a subsequent meeting or sooner, if necessary.
   Principles to be observed are:
   a. The people have a right to be heard.
   b. The board has a right to be completely informed and to deliberate in a climate which is free of intimidation, which normally would be the next meeting.
10. He should not be upset over conflict within the board. He should

seek consensus but not expect it in every case.

The Board Member's Role

1. He represents the people in matters of education policy. He is an authorized legislative agent. He acts vicariously for the people, but not independently. He must be sensitive to their needs and concerns, yet he must be able to stand by his decisions and those of the board.
2. He must be informed on issues.
   a. He must do his homework, and read the material sent to him in advance.
   b. He must try to be objective, not prejudiced. He must ask questions, seek facts.
3. He must avoid a tendency to dominate discussion, if this be a temptation. He must be conciliatory when the group tends to polarize. He must speak boldly to the question when the group avoids the issue and contribute to the dialogue. He should not wait until the chairman asks him personally for his opinion. He should not be a prima donna participant.
4. He should abide by the group's decision and not be a backbiter with the board. If he should end up in the minority, he should not be afraid to vote with the minority. Time will tell or may give him an opportunity or an occasion to call for a reconsideration.
5. He should not pontificate as a board member. Outside of the board meeting the individual board member is just another individual. He does not represent the board officially unless there has been an explicit authorization. Board members have no authority except when acting in an officially called meeting at which there is a

legal quorum.

The Pastor's Role

1. Yes, he should be a voting member.
2. He is not the executive officer of the board, but the leader of the Christian community. (Even if he writes and/or signs checks relating to school expenditures or hires and/or fires teachers, janitors, etc., which are, properly speaking, administrative functions, he is not, as a rule, the school administrator, and thus not the executive officer of the board.)
3. As a board member the pastor has his unique input to make: his knowledge of the community, his familiarity with the financial situation, and his concerns with the educational needs of the people, both those identified with the school and those not so identified.
4. He should enter into dialogue freely and easily, without demanding or expecting special treatment or recognition, His authority must not be exercised in a dominative way. His presence must not inhibit discussion. His absence must not be construed as a matter of aloofness or disdain.
5. The pastoral veto, while it is theoretically and canonically possible, should be exercised rarely and only in terms of a serious, conscientious objection. Pastoral veto of a board decision, like every pastoral action, is subject to appeal and review by a higher authority.
6. The parish council is a coordinative body. It's coordinative function is related largely to budget approval. It has no direct responsibility regarding the educational programs. It does not

substitute for or supercede the parish board of education.

The Superintendent's Role as Executive Officer of the Diocesan Board.

1. He identifies policy questions relating to educational institutions and programs in the diocese.
2. He decides whether particular policy questions ought to be referred to the diocesan board or to subsidiary boards.
3. He helps the board to see and to evaluate the educational effort of the diocese in terms of the defined objectives of the board.
4. He assists the educational institutions under his jurisdiction in their effort to attain the objectives established by the board.
5. He facilitates communication between the board and the diocesan community, especially the ordinary and, if such exists, the diocesan pastoral council, with reference to major educational policy questions.

Qualifications of a board member

He should have: broad shoulders; a duck's back; the ability to smile; a head for figures; foresight; a high boiling point; an open mind; a sense of humor; and the ability to sleep at night.

Rev. Olin J. Murdick
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SOME POLICY NEEDS RELATING TO RELIGIOUS EDUCATION

The trend in Catholic boards of education seems to be towards a broader educational responsibility. Thus many boards which originally were concerned with schools only, have now assumed or have been given a responsibility for nonschool programs as well. In anticipation of the difficulties which are inevitable with a rapidly expanding, experimental, informally organized, largely volunteer effort, namely religious education, it behooves such boards to take initiative in developing and providing appropriate policies for religious education.

Some of the policy needs which seem to relate to religious education are as follows:

1. The need for an organization chart. If the diocesan board, in terms of its constitution, is comprehensive in its jurisdiction, i.e. a board of education, broadly conceived and not just a school board, then it theoretically has responsibility for all formal religious education out of school and in school.

How the diocesan director of religious education relates to the diocesan board, whether through the superintendent of schools (the Lee-Hiltz recommendation) or co-equally with the superintendent of schools or through a secretary or vicar of education, is a basic policy decision for the board. (See flow charts A and B)

(The question of whether the coordinator for religious education in schools should be responsible to the superintendent of schools or to the director of religious education should be resolved in terms of which line of accountability assures the most effective religious education program for schools.)

2. The need for job descriptions. The precise scope of administrative responsibility of the director of religious education is another major policy decision which the board should make; whether this responsibility is to include

school programs as well as nonschool, adult education, campus ministry, youth ministry, etc., is a question the board should attempt to resolve. Also needed are correlative job descriptions for the secretary (superintendent) of education, the superintendent (director) of schools, etc.

3. The need for establishing the authority of the religious education director. The duty and, therefore, the right of the religious education director to visit parish and area centers, to evaluate programs, to recommend pastoral appointments favorable to good religious education programs, to recommend program improvements, and to report periodically to the board regarding the progress or status of religious education in the diocese needs to be established by the board and recognized by the community as standard and normative policy.

4. The need to set priorities. Questions of priority regarding the obligation of the parish community to support various educational programs, schools, adult education, etc. need the benefit of diocesan policies which establish the criteria and the procedures which relate to good decision-making.

5. The need for personnel policies. Policies regarding: selection, training and certification, evaluation, compensation, and dismissal of all personnel engaged in religious education. (This with reference to all levels of administration and all kinds of personnel whether administrative, teaching or auxiliary.)

6. The need for a policy which reflects theological pluralism. A policy regarding the right of parents who may reject the regular religious instruction (perhaps as being too modern, too far removed from the Baltimore Catechism, etc.) is needed if the board is to respond effectively to a de facto pluralistic situation.

7. The need for a policy assuring orthodoxy. A policy regarding the criteria and procedure for judging and controlling orthodoxy of religious instruction in any given place.

8. The need for a policy regarding objectives. A policy defining the doctrinal, attitudinal and behavioral objectives of the religious education program. Such a policy ought to enjoy highest priority preceding perhaps all other policy concerns.

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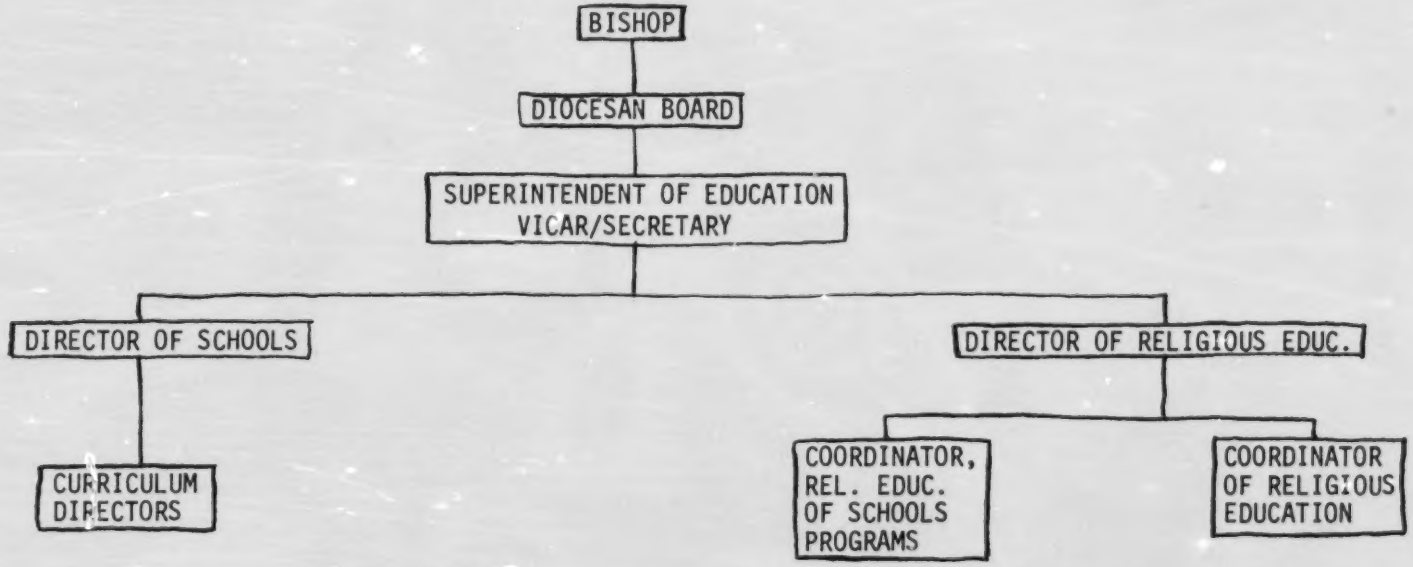
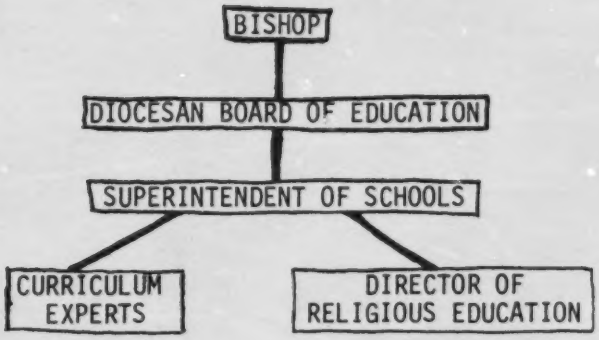
Proposed Flow Chart #A

As basis for a coordinated approach to all educational programs, school and nonschool.



Proposed Flow Chart #B*

Proposed as a basis for a coordinated approach to all educational programs.



*Based on the recommendation of James Michael Lee and John T. Hiltz "Diocesan Religion Programs: A national survey, The Catholic Educational Review, Dec. 1968.

THE PRINCIPAL AND THE BOARD

1. The policy approach to good school administration.

Every successful school administrator tries to act on principle and not merely on situational impulse or intuition. Every principal has his own style of administration which reflects his personal value system, his own perception of human nature and conduct. No matter how personal his administration style is, his effectiveness in terms of his clients (the students), his colleagues(the faculty), and his public (parents, parishioners and the press) will depend on his having recourse to <u>policies</u> which are wisely and representatively conceived.

The effective operation of any organization requires an administration based on policy. The policies of an organization are guidelines for administrative action consistent with the goals of the organization and with each other.

The principal and the faculty work most effectively when their activities are goal-oriented and policy-guided. This applies first to the administrator, then to the teacher. Good administrative theory holds that employees who are not goal-oriented but who are other-dependent and other-directed are, in the long run, not as efficient as those who identify meaningfully with the organizational goals.

Student behavior is likewise affected by the administrative style of the principal. If administrative decisions and rule-making are based on principle, i.e. policy, they will have a consistency, a predictability and a fairness which will not escape the notice of students.

Parents, parishioners, and the school's public likewise appreciate the administration that is visible and credible in terms of policies which enable the institution to achieve its objectives. Every school administrator is himself something of an institution, i.e., he is a personal, living, sensitive

extension of the institution which he administers.

To the extent that a school or a school system is operated not in terms of extablished policies but rather in terms merely of the administrator's personal value system, the educational institution will lack a continuity of effect beyond the term of any particular administration.

Another benefit of policy-guided administration should be felt by the administrator himself who, knowing that his everday decisions and the rules he makes and unmakes, are shared with others; are not arbitrary, individual acts, but a discreet combination of corporate wisdom and personal judgment. This, I think, ought to be a source of satisfaction and an important ingredient for the mental health of any school administrator.

Historically and constitutionally, policy-making has been the prerogative of bishops, pastors and administrative superiors. All this is changing, thanks to the Constitution on the Church and other influences emanating from Vatican II.

2. Policy-making is basically the board's prerogative.

Having indicated the important, even essential connection between policy and administration, I would like next to show why policy is basically the prerogative of the board, not of the administrator. In the first place I would ask, why does a school exist? Is it in order to provide employment for the administrator and the teachers? No. A school exists to serve the educational needs and interests of a given community. These needs, therefore, ought to be identified by and for the community in terms of a representative board. The principal's role as educational leader is to help the board to identify policy needs, to develop and determine policy elements, to monitor policy implementation, and to evaluate programs and program outcomes in terms of the policies, objectives and goals which it has established and recognized. This dual role on the part of the principal--servicing the board with reports and recommendations, and serving the board by administering the school--calls

for a more sophisticated kind of educational leadership than does the traditionally autonomous administrative position.

To understand the principal's role in relationship to the board it is necessary to understand what the board does. Every board of education, properly conceived, has four kinds of responsibility:

1. "To establish the objectives of the schools."
2. "To select or determine policies which will guide the administrative staff in working toward those established objectives."
3. "To review the decisions which have been made by the administrative staff to carry out the board's policies."
4. "To evaluate the effect of the board's policy decisions in achieving the board's objectives." [1]

Concerning the first function, namely, the establishment of the objectives of the schools, may I say that in this age of institutional change and challenge, goal setting is hardly a routine activity.

This is especially true in the field of education which, of necessity, is involved in many institutions and, therefore, in much institutional change. Schools everywhere are being questioned not only regarding how they carry on the educational process but why they do, and what they seek to accomplish. A society which is uncertain of its own values must of necessity be uncertain concerning that institution which seeks to transmit those values. This is the situation in which every school board today finds itself, faced as it is with these questions: What should we teach? How much should we teach? Whom should we teach? How much money can we afford to devote to education?

These questions must be recognized and faced at all levels--in the parish, in broader areas of service which may include many parishes, in the diocese, and in the larger communities of state, nation and world. There ought to exist at every level appropriate board structures, truly representative of the

[1] Daniel R. Davies and Henry M. Brickell, How to Plan For and Conduct Your School Board Meetings, (Croft Educational Service, New London, Conn.)

communities which they serve, and properly subordinated to each other so that the educational philosophy of the Christian community can evolve and be coordinately articulated in terms of a true consensus and the common good.

Goal setting is a sensitive kind of responsibility, one which draws gratefully on the past, looks critically at the present and hopefully to the future. In the case of the Christian community there can be no question of whether we should be engaged in the work of Christian education. As the Declaration on Christian Education of Vatican II recognized and states, we must be committed as a people to the goal of Christian formation not merely in terms of the indispensable and primary influence of the Christian home, but in terms of educational programs and institutions operated in behalf of the larger Christian community, whether it be the parish or some other functional grouping.

Establishing the objectives of the Catholic educational institutions today is an exciting, terribly important kind of responsibility. It relates not only to the difficult questions of defining the educational needs of a space-age Christian but to the question of the responsibilities of the Christian community to the disadvantaged and others--non-Catholics--whose educational needs lay a claim on our readiness and ability to serve. Here the board should be ready to play a leadership role with reference to the community it serves, enlisting support for its decisions to provide educational opportunity for the poor and those not of the household of faith.

Another area of concern which a Catholic board of education must not ignore is the right of Catholic parents to receive financial help from the state in order to exercise their freedom of choice in providing a Christian education. The Declaration on Christian Education reaffirms the right of parents to choose the school which will meet the educational needs of their children. It affirms, likewise, the duty of the state to provide significant

financial help for Catholic schools. Every Catholic board of education, as it seeks to define the objectives of its schools, needs to be cognizant of this basic right in distributive justice and should, according to circumstances, give its support to political efforts to secure this right.

So much for the first basic function of the board--establishing the objectives of the schools. The second function, flowing from the first, deals with means to the end: the selection of policies which will guide the administrative staff in working toward those established objectives.

A policy, as Davies and Brickell have stated, is "a guide to discretionary action." Every policy represents an expression of board intent regarding some aspect of school organization or operation. It is a legitimate kind of responsibility for the board to have because it relates to the objectives of the school and the capacity of the community to provide an educational program appropriate to the attainment of those objectives.

All policies are based on the policy elements which the board, in the course of its analysis of any given problem, real or anticipated, identifies. Policy elements are, in effect, the value judgments and concerns which the board expresses, more or less informally, whenever it is asked to look at a problem and to define or select a policy which will guide the administrator in dealing with that problem or similar problems yet to arise.

The key figure in any successful board meeting is the administrator or executive officer--the superintendent (if a system of schools is involved) or the principal (if only one school). The administrator should come to each meeting prepared to answer three questions:

1) What are we going to talk about tonight? (What problems do we have that require policy action?)
2) What do you want us to do? (What policy do you recommend?)
3) Why do you recommend this course of action? (What evidence do you have to support your recommendation?)

It is the superintendent (or principal) as executive officer of the board, who recommends a policy. He does not make it. He has no right to insist on board support for this or that policy recommendation. He informs the board, he advises the board, but he does not, and should not, control the board. He exercises educational leadership strictly in terms of his professional competence. Any problem which he presents to the board represents an area of administrative concern for which no policy, or at least no adequate policy, yet exists. If a policy already exists there would be no need to go to the board except perhaps to give the board an opportunity to review the administrative decision post factum. Which brings us to the third function of the board, namely, to review the decisions which have been made by the administrative staff to carry out the board's policies.

This function of the board should not be construed as interference in the administrative sphere. The board's activity is simply that of monitoring the school's operation as reflected in administrative decisions. Regular reporting of such administrative actions, especially those of an unusual or possibly controversial nature, is a means of reassuring the board concerning administrative decisions and a means of reassuring the administrator regarding board support and confidence in him.

The fourth basic function of the board is evaluative. The board's work is quite incomplete unless it asks itself periodically: Are the policies which we have made, is the program which we have authorized, producing the results which we envisioned? How effective is the educational process which we have provided? How satisfactory is the product? Here it is quite proper for the board to request evidence of success and failure, of strength and weakness, not in order to place blame but in order to make an honest appraisal. Education today generally suffers from a credibility gap. To close this gap between

society and the institutions which serve it, is perhaps the greatest social need of our times, a need which can best be met in terms of the invaluable "loop concept" developed by Davies and Brickell. If some public school systems have failed to overcome this gap, it may be precisely because their boards have failed to perform this proper function of evaluation. Hopefully, Catholic boards of education and the administrators who represent them, can and will avoid this fundamental mistake.

I would like to conclude this presentation of the four basic functions of a board with yet another Davies- Brickell concept, namely, the Davies-Brickell loop.

At the beginning of the loop there are objectives. Every school system has them. They are subscribed to, and ideally, articulated by the board. They represent what parents presumably want for their children.

Then come policies, which are also the product of board action. The administrative staff makes regulations, specifying how policies apply in the school situation. Rules lead to action. They translate board policy into educational programs.

But we cannot stop here. The board needs to know how effective the educational programs are. The board needs reports on the educational process. It needs to know that teachers are qualified, instructional materials are adequate, class size is reasonable, etc. These reports, however, do not tell anyone whether this system is meeting its objectives. A second kind of report has to be concerned with product. Scores on standardized achievement test, data on the dropout rate, facts on job placement after graduation, evidence of religious understanding, etc.--this represents a measure of the effectiveness of the school's program.

Davies and Brickell contend that laymen can "monitor the performance of a professional staff given three conditions".

1) That the board starts with a clear statement of objectives understandable to laymen.
2) That the board adopts and maintains a written set of policies designed to set the conditions most likely to achieve the goals.
3) That the board insists on a good set of both process and product reports. The latter are especially important because they enable the board to close the loop by comparing results with the stated objectives.[2] This approach to educational management gives the board the "control" it needs, the administrator the "authority" he needs.

All institutions today, and Catholic institutions perhaps more than others, are undergoing the therapeutic consequences of challenge and change. Catholic schools are no exception. If they are to meet the needs of the people and to enjoy the support of the people they must be representative of the people and accountable to the people in terms of representative boards.

In stressing the board's prerogatives on the one hand, and the subordinate leadership role of the school administrator on the other, it may appear that I have created a situation of inconsistent, if not impossible, expectations. How can one lead if he is consigned to a position of dependence and subordination?

I would prefer to see in this situation a paradox rather than an inconsistency, a more profound indication of the nature of educational leadership. The school administrator in relation to the board must be a leader in terms of policy development, a follower in terms of policy execution. This dual role is not without its tensions and disappointments, but it is a role which, if well played, will be the most effective educationally and the most satisfying professionally.

Board members, too, must experience satisfaction. And this they can if every participant in a board meeting plays his respective role properly. The administrator's (principal's) role has been delineated already. Another key

[2] Daniel R. Davies, James R. Deneen, New Patterns for Catholic Education, (Croft Educational Services, New London, Conn.) 1968, p. 112.

person whose function is no less important is the chairman, for it is his responsibility to facilitate, coordinate and regulate board discussion, thus enabling it to become productive. The board should be able to experience the satisfaction at every meeting either that previous policy determinations are in fact working, i.e. that the school program is being administered satisfactorily or, more typically, that the problems related to school operation--having been identified and reported by the administrator--are indeed manageable in terms of policies which they adopt.

But the ultimate satisfaction, for both administrators and board members, is knowing that you are serving the community in a very significant way, exercising educational leadership in a time and a society which sorely needs it. You are very important people!

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THE BOARD'S ROLE IN BUDGETING

One area in which a board can offer real leadership is in the process of budget approval. Properly understood, the budget is the most effective tool available to the board for realistic planning and sound decision making.

A budget is simply the financial expression of an educational plan. It is the translation into dollars and cents of what an educational institution wants to accomplish. It is the most direct way of expressing what are the priorities, what areas are to be stressed and strengthened, what items are to be "traded off" for more urgent matters, what are the benefits to be derived in terms of the cost of any given program. Just as the nation determines the degree of its commitment to space exploration, elimination of poverty, or national defense by way of the federal budget, so a school through its budget determines the importance of the quality of its teachers, its commitment to innovation, the maintenance of the physical plant, and the like.

Budgets are often misunderstood and therefore misused. A budget is not a set of limitations: When a wife buys an extravagant dress, the husband says, "I'm going to put you on a budget!" A budget is not a set of demands: When a wife feels her household is being neglected, she tells her husband, "I'm going to present you with my budget." Most important, a budget is not simply a vague general estimate: "Here is $500 for your program; just don't bother me for anything more."

Advantages of Budgeting

The advantages of a well planned budget are so apparent that it is difficult to understand how an educational institution can operate without one. First, the budget gives the board an opportunity to view as an overall picture an entire year's program. The board can look at the entire package, and not be faced with the uncertainty of, "If we buy a new projector in October, what will they want in November?"

Second, the board has a better opportunity of giving a fair emphasis to each need of the institution and thereby avoids arbitrariness. The old saying that "the squeaky wheel gets the oil" applies as readily to schools as to any other organization. Often, the departments in a school which are strongest are those which have the greatest lobbying ability, not necessarily the greatest need. The budget allows the board to make serious comparisons between the athletic budget and the library budget, between the instructional supplies and the custodial supplies.

Finally, a good budget avoids the hand-to-mouth existence which many operations now experience. The trauma of running out of essential materials, not having the money for necessary repairs, not being able to meet bills on time because of unplanned cash flow can be practically eliminated by a well constructed budget. A good annual budget soon leads to the realization of longer range planning, in which more expensive improvements can be planned over a period of years.

Budget Calendar

Perhaps the best way to study the process of budgeting in detail is to look at a typical budget calendar. The calendar given here is prepared for a school, but can be readily adapted to other educational operations by simply substituting the word "chief administrator" in place of "principal" and making other obvious changes where necessary.

1/15 to 2/15	Prebudgetary conferences	Principal meets with pastor and board to discuss external constraints (parish subsidy, tuition to be charged, etc.) under which the school must operate. Principal meets with teachers to review budget development process. Principal meets with individual teachers or department heads to discuss their particular needs.
2/15 to 3/15	Preparation of budget requests	Each department head prepares budget request sheets (Figure 1), completely describing each item, including cost and priority. Department heads include maintenance foreman, activity directors, school office manager, convent superior, etc. In an elementary school organized by grades rather than departments, each teacher may have to prepare request forms.
3/15 to 4/1	Compilation of budget requests	Principal takes items from individual request sheets and compiles them according to expenditure categories described in the chart of accounts. These are listed on budget presentation sheets (Figure 2), one sheet for each category. Estimates of receipts by each accounting category are also made on budget presentation sheets.
4/1 to 4/15	Final budget conferences	Principal meets with department heads to discuss final budget, changes and elimination of items, reconciliation of similar requests by different departments, etc.

4/15 to 5/1	Preparation of budget document	Principal prepares final budget document: budget summary (Figure 3), a budget presentation sheet for each accounting category of receipts and expenditures, and any other explanations and supporting documents considered necessary. (For example, if a school wanted to hire additional personnel or buy extensive equipment for a new program, it would not be enough to simply request the money; the request should be accompanied by an explanation and justification of the expense.)
5/1 to 5/15	Presentation of budget document	Principal presents the above budget document to the pastor, school board, or other approving authority. Ideally, the budget should pass from principal to pastor for initial approval, then to school board for adoption, then to parish council for integration into overall parish budget.
5/15 to 6/1	Adoption of budget	The budget should be formally adopted by the board by June 1. Once adopted the principal should be able to make expenditures without specific approval of the pastor or board, since all the items have been approved for purchase in the adoption of the budget. The board should require periodic reports by the principal which assures that the budget is being maintained. Any expenditure which is not budgeted or any transfer of funds from one budget category to another should require specific approval by the board.
6/1 to 6/15	Transmittal of budget	Final approved budget is transmitted to department heads. Any purchasing arrangements which must be made before teachers leave for summer are taken care of at this time.
7/1	Implementation of budget	Fiscal year under new budget begins. Accounting for income and expenditures is carried out according to the NCEA Accounting Manual.
10/1, 1/1, 4/1	Budget review	Each quarter the budget is reviewed and revised if necessary in the light of the year's experience.

Budgeting Process

Several cautions should be noted in relation to the above calendar. One should not be overwhelmed by the numerous steps in the budget calendar; the process is not as complicated as the deliniation of steps might imply. The work of budget development should be begun early and spread over a period of months so as not to create an undue burden or engender a spirit of crisis for the people involved. Although a workable budget might well be developed by one or two persons operating in a short period of time, one of the most important aspects of budgeting as a process is the involvement of all members of the educational institution. Such involvement makes each member of the educational community more conscious of the overall needs of the institution, the actual cost of their requests, which might otherwise be taken for granted, and the complex decisions faced by the administrator. Teachers can often make unreasonable demands for their departments while at the same time maintaining that tuition should not be increased; involvement in the budgeting process puts them in closer contact with the realities of the situation.

Although every operation should have a well defined budget calendar, it may be necessary to adapt the sample budget calendar to local conditions. Some decisions which have a profound effect on the budget must be made prior to the final adoption of the budget in June, notably the determination of the number of lay teachers to be hired and the salaries that they will receive. In such instances, the budgeting process of those particular segments of the budget must be moved back several months.

It should also be understood that although it is helpful to divide the steps of budget development for the sake of a calendar, these steps overlap and should not be completely considered distinct. For example, the principal might well discuss with the board many problems of the budget during the compilation period in March, and not wait until May when the budget is presented as a finished document.

The Board's Role

The principal responsibility of the board in budgeting is to approve the budget once it has been developed. The basic work of preparing the budget should be left to the professional staff, and the board should be careful not to intrude in this area.

However, this does not imply that the board will not be in communication with the staff during the months of preparation. The board should have a good deal to say in the prebudgeting conferences regarding the general goals it wants to pursue through the budget, as well as limitations it foresees based on available income. As the chief administrator begins to compile budget requests, the board should be informed of any extraordinary requests before the budget is finalized.

In the actual situation, some board members may have special competence in areas of business management which the principal might tap for assistance. Nevertheless it is important that the board see its role as approving an educational plan rather than formulating the plan. In other words, the board should not get involved in debates over which tools are best for a given job but rather whether the job fulfills the goals which the board has set.

Lest all this finance seem too mundane for the idealistic board member or principal ("I am interested in education, not business management!"), it is well to remember that without careful planning our institutions will not survive to fulfill their educational mission. Indeed, one could even maintain that budgeting stems from an evangelical counsel:

"If one of you decides to build a tower, will he not first sit down and calculate the outlay to see if he has enough money to complete the project? He will do that for fear of laying the foundation and then not being able to complete the work; for all who saw it would jeer at him, saying, 'That man began to build what he could not finish,'" Luke 14:28-30.

Budget Requests

Year_____ Department_____ Total Allocation_____

List below items to be budgeted for your department. Items should be grouped and totaled separately according to the following categories: supplies, repairs, replacement of equipment, new equipment, audio-visual materials, dues and subscriptions, and travel. For each item give the exact cost and its priority according to the following scale: E = essential; HD = highly desirable; D = desirable; P = postponable.

Quantity	Description	Cost	Priority	Principal's Recommendation

Figure 1

Budget Presentation

Year_____ Account #_____ Total Allocation _____

Date Needed	Description	Amount	Remarks

Figure 2

Budget Summary

	Receipts	Previous Year	Budget Year
10 01 01	Tuition, Regular or Current	_____	_____
10 01 02	Tuition, Summer School	_____	_____
10 01 03	Tuition in Arrears	_____	_____
10 02 01	Registration Fee	_____	_____

Figure 3

Recommended References

J. Alfred Moroni, An Accounting Manual for Catholic Elementary and Secondary Schools (Washington: National Catholic Educational Association, 1969.) This is the basic manual for uniform accounting for Catholic schools, from which individual systems or schools should develop the chart of accounts used for budgeting.

Patrick J. O'Neill, Accounting Manual for Parish Schools. This is a simplified accounting system based on the NCEA Manual, particularly suited for small schools, and now in used in about 20 dioceses. Available from the Diocese of Fall River, Mass.

Uniform Accounting System Manual for Parishes and Schools of the Province of Michigan. An accounting manual for the entire parish operation in addition to schools. Available from Michigan Catholic Conference.

Anthony E. Serdl, Focus on Change - Management of Resources in Catholic Schools. (N.Y.: Joseph I. Wagner, Inc., 1968). An excellent manual covering all the business management operations of Catholic Schools.

Stephen J. Knezevich and John Guy Fowlkes, Business Management in Local School Systems (New York: Harper and Brothers, 1960). A manual intended for public schools but readily adaptable to Catholic schools.

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GOALS FOR THE CATHOLIC SCHOOL

The Catholic school is a Christian community. The main members of the community are the faculty, the students, and their parents. It is a community organized for the purpose of promoting the fullest and most desirable growth in the students. This growth comes through a community experience: faculty, students, and parents all taken up in the common enterprise of Christian human growth - - each offering his own unique contribution. Even though growth of the student is the primary objective, both faculty and parents realize that their own simultaneous growth is an essential ground for student growth, and the student should realize with increasing insight that his own growth is an occasion for further human growth in his parents and the faculty. To the extent that each member of the community is committed to growth - both his and that of others - to that extent shall he really participate in the dynamics of community living and come to understand what community living has to offer.

As a community, the Catholic school should not be isolated. Rather, it is related to and part of many other communities: the larger Church community, the civic community, the social and economic communities. It is not, therefore, a ghetto and would become such only if it failed to insert itself into all the other communities to which it is necessarily related and in which it exists.

The Catholic school is not merely a collection of individuals under the same roof. The individuals are unified by their common effort toward Christian human growth. While the focus is on the student, the concentric outreaches of growth include both faculty and parents. A parent, for example, who enrolls his child in a Catholic school and does not realize that he is also involving himself in something which involves his own personal growth, does not sufficiently understand the Catholic school as a community - all

contributing, all receiving. A faculty member who believes that student growth can take place without his own personal growth would fail to grasp the depth to which membership in a community really calls one. A school administration which did not develop educational programs for the faculty and parents as well as for the students, or which did not have parental, faculty, and student participation in school policies, would be failing to understand the school as a community enterprise. The Catholic school needs input from all members and output to all members if it is going to be, in fact, a community.

The Catholic school is a particular kind of community. It is a Christian community. It is not a community organized around the thinking of John Dewey or James Conant. It is a community organized around the person of Christ himself. He is central. The understanding of man's nature, the meaning of the world, the purpose of living, the realities of everyday living are not merely some philosopher's, but Christ's. The need for worship, the personal and cosmic presence of God as Father, the necessity of both faith and works, the relationship of this life to future life, man's personal responsibility and accountability, man's identification with his neighbor - - these and many more teachings of Christ are what unite the community. In fact, it is not only the teachings of Christ but the person of Christ which is the unifier through the Eucharist, penance, prayer, indwelling.

Because the Catholic school is a distinctively Christian community, the faculty must see itself as more than a group of professionals, good as that may be. They must be a religious group, having a Christian consciousness about itself, a Christian outlook and purpose, a Christian life. Also, the student should see ever more clearly as he matures that, of all the persons who influence his life, the person of Christ is unique. It is not like being influenced by anyone else. He meets God in prayer and worship, in his study,

in his fellow students, parents, faculty -- and he learns to know who it is he is meeting. Parents, too, should see that in Christ they make continual further discoveries of "what it is all about". They need to find what are the best ways of promoting an awareness of the person and meaning of Christ for themselves and their children. Praying together, celebrating the Eucharist together, working together, learning together, socializing and recreating together -- these are the things which help build a sense of community in a Catholic school.

The Catholic school is a Christian educational community. As such, it develops the basic skills, progressively opens man's accumulated culture, teaches critical thinking. Using the insights of modern educational psychology, it emphasizes learning rather than teaching, self-direction rather than external motivation. It is concerned with the pursuit of truth and all the tools needed for it. It is concerned also with an experience of the good and the beautiful because growth in all its dimensions is the objective. Whatever is open to growth should find its way into the programming of the Catholic school.

As an educational community, the school acts on the premise that education is a day by day process. It takes a lot of time for the community of faculty, students, and parents to learn how to better interact with one another so that the greatest possible growth can take place for all. It is expecially true that a great deal of time and numerous kinds of different experiences are necessary if such a community is really going to be Christian. Religious education has to do not only with instruction but also with values and attitudes, something which cannot be achieved on a part-time or occasional basis. The Catholic school tries to present an education which is not compartmented or fragmented. Man himself is not that way; neither should his growth be that way.

In summary, the Catholic school now exists and is necessary in order to create a Christian educational community where human knowledge, enlightened and enlivened by faith, is shared by teachers, students, and parents in a spirit of freedom and love. This single statement used as the basic starting point leads to a consideration of the broad goals of a Catholic school. Although a single national listing of goals for the Catholic school is probably not necessary, there can be national agreement on what the Catholic school is and what it should do. The ways of expressing such goals verbally will probably differ from one locale to another. Hopefully, the ones offered here would find substantial national agreement in content if not in particular choice of language or style of presentation.

Goals for the Catholic school should flow from the fundamental understanding of the school as a Christian educational community. Because it is CHRISTIAN, the school should

-- encompass in the concept of education the vital place of faith, treating key questions regarding creation, redemption, and salvation - God's invitation to eternal life.

-- offer personal experiences in Christian living through liturgy, sacramental life, prayer, guidance and example, as well as service organizations.

-- provide association between families and professionally qualified faculty who have a conscious and deliberate Christian outlook on life and the world.

-- develop religious understanding and provide opportunities for personal commitment to religious values.

-- foster a Christian understanding of men's mutual responsibilities for one another.

In addition, precisely because it is an EDUCATIONAL institution, the

Catholic school should

-- develop the basic skills, especially in the arts of communication and in quantitative thinking.

-- make accessible to each student man's accumulated culture and knowledge.

-- help each student develop a positive attitude toward life-long education including the power to think constructively, to solve problems, and to reason independently.

-- guide the student toward the spirit of freedom which recognizes self-discipline and personal responsibility.

-- help instill a sense of responsibility to the community and the need for service to it.

-- offer experiences through which each student can develop an appreciation of his aesthetic senses.

-- promote physical fitness and encourage habits which build and maintain good health.

-- offer experiences through which the student learns to use his leisure time well.

-- prepare the student either for further education in college or for profitable employment, thereby furthering his ability to achieve personal goals.

Finally, because it is a COMMUNITY, the Catholic school has still other goals. As a community <u>in its own right</u>, the Catholic school should

-- encourage the faculty, parents, and students to a mutual awareness of what it means to be a member of the Christian community.

-- provide communal religious and social activities.

-- offer educational programs to both faculty and parents, over and above the educational programs for students and related to the student's programs as much as possible.

-- focus attention on growth of all members of the community as the concern of each member of the community.

As a community related to other larger communities, the Catholic school should

-- fulfill a secular education function which society has decreed as essential.

-- provide opportunities and experiences which emphasize the heritage, the responsibilities and privileges of American citizenship.

-- work with the community at large toward developing a better understanding and cooperation between all racial and religious groups.

-- provide for richer participation in parish life.

-- provide an alternative to the public school system, thereby avoiding a monolithic educational system from which wholesome diverse views could possibly be eliminated.

-- prepare young people for the labor force and for professional positions in the community.

Conclusion. Goals are related to the present in the sense that they are here and now consciously agreed upon and possibly already partially attained. They are related to the future insofar as they are not yet fully achieved, but give realistic direction to what can and should be achieved. An extensive examination should be made of each of the goals above and activities developed which will lead to their achievement. A great deal needs to be made specific and concrete. Furthermore, if the basic goal of the Catholic school is to create a Christian educational community, the faculty, students, and parents will have to work together in coming to a reasonably agreed upon understanding of what that phrase entails, as well as the steps which should be taken in order

to create such a community. The faculty should lead in this effort, but in a way which immediately includes the parents and students. The cooperative effort at defining ever more clearly what a Christian educational community is, and what it does, will itself be an experience in Christian community living.

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